

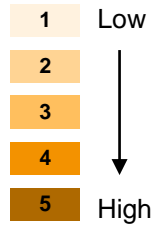
*Mapping the markets – is enough
being done?*

Flexible Market Monetisation

Development of local energy systems

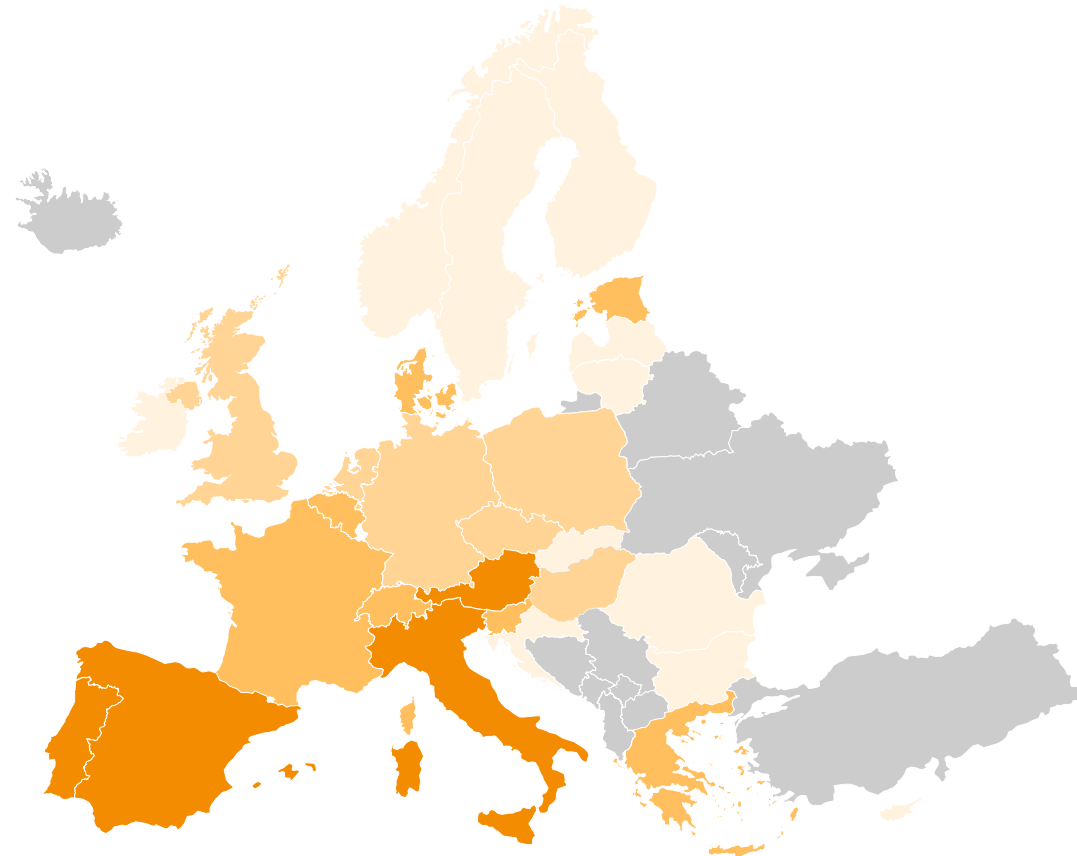
Where are we now?

Development of local energy systems



We looked at:

- Is collective self-consumption allowed?
- Is there a national framework for citizen energy communities?
- Is there a national framework for renewable energy communities?
- Are there subsidies that enable local energy systems?



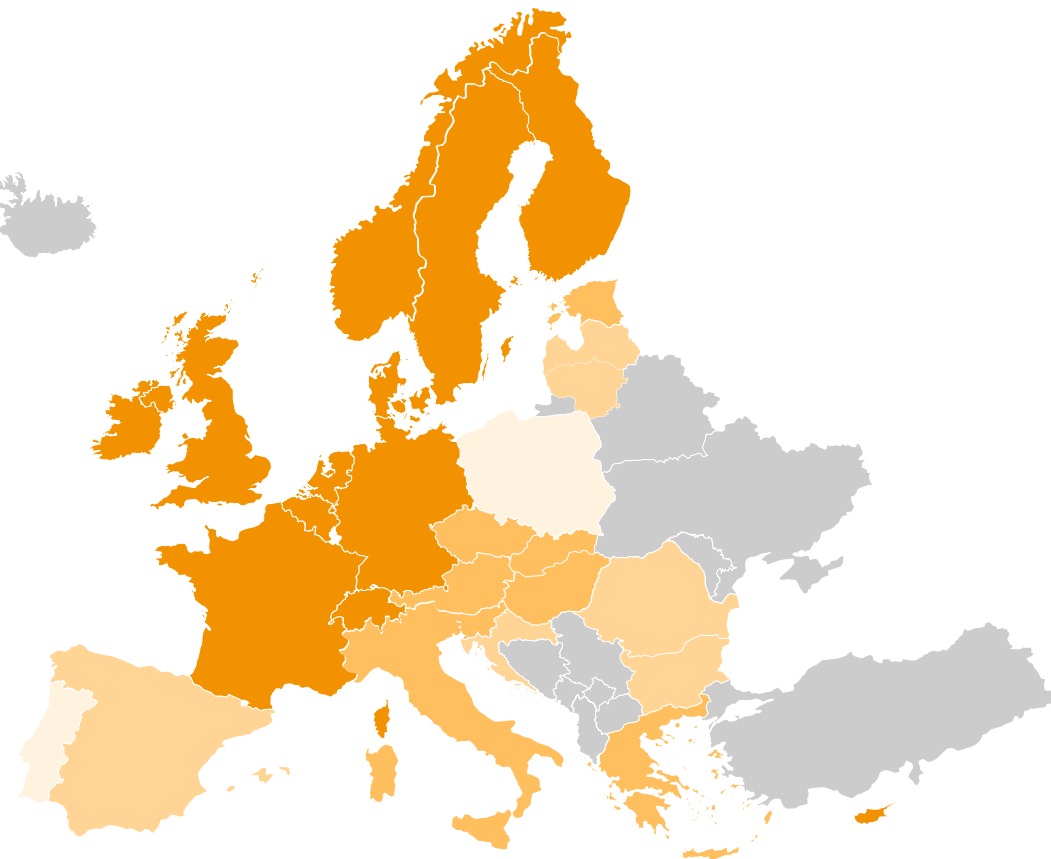
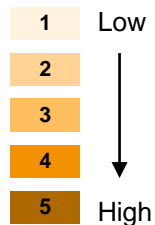
Current development focused on Spain, Portugal and Italy

Energy crisis, dynamic tariffs and export revenue driving growth

Local flexibility cannot capture TSO value

Where is the current value?

DSF Regulatory Progress



Current development focused on Spain, Portugal and Italy

Energy crisis, dynamic tariffs and export revenue driving growth

Local flexibility is not currently matched with TSO accessibility

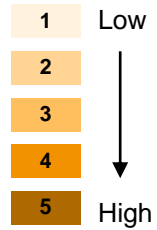
We looked at:

- Is the market commercially operational?
- Can DSF participate?
- Is aggregation allowed?
- Is storage allowed?
- Min bid size of 1MW or less
- Is a BRP agreement required?
- Is there a a-symmetrical product design?

Distribution system flexibility

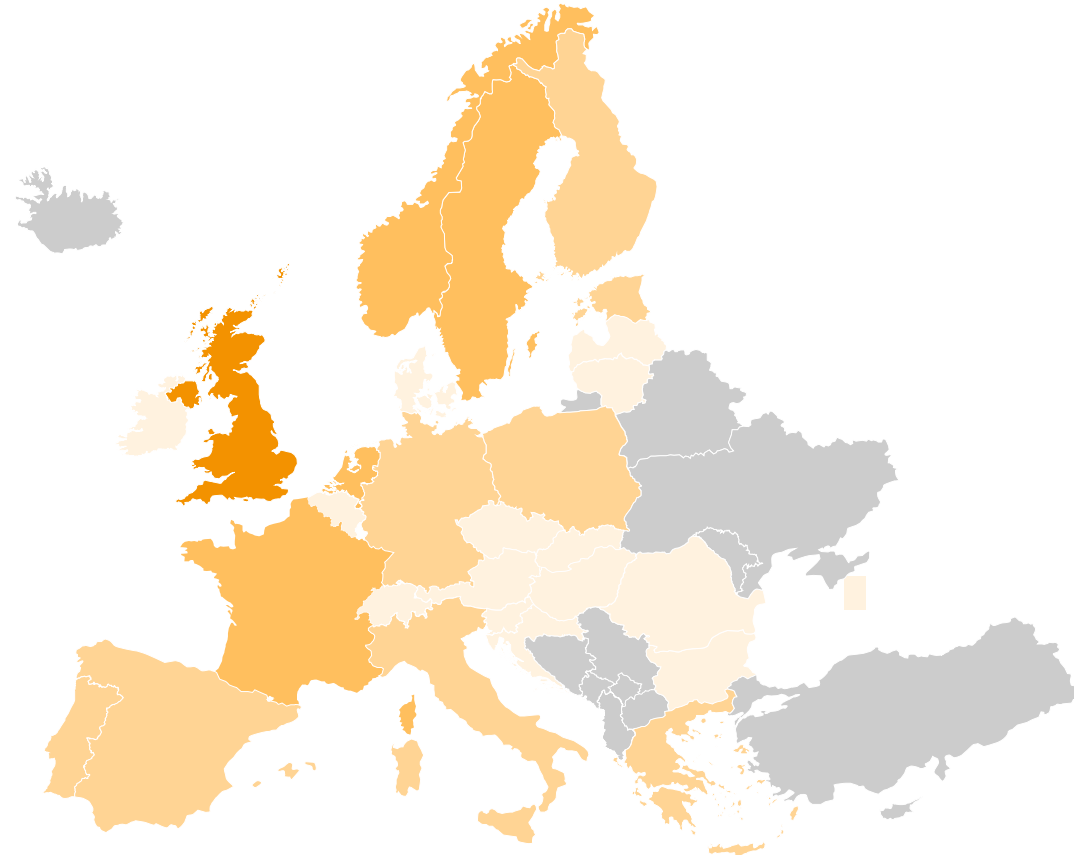
Where are we now?

Development of DSO flexibility



We looked at:

- Whether there are commercial DSO flexibility markets.
- How many DSO flexibility trials are happening in the country?
- What is the volume of flexibility being traded in the commercial market and trials?



GB is leading the way followed by Netherlands, France, Sweden and Norway

Lack of liquidity is still a concern

Part of the value stack

Will the EMD help or hinder progress?

Recommendations from the Electricity Market Directive proposal

Flexibility assessments (TSO and DSO)

Separate metering of residential flexible loads

Enable energy sharing

DSO/TSO co-ordination

Potential challenges

Data and communication requirements

Increased localized congestion

Who will get priority?

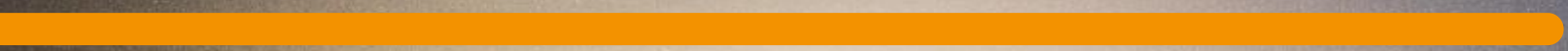
What can we do about it?

Allow group data and frequency measurements

Self balancing district

Market based co-ordination

+ LCPDelta



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